



Electronic Research Administration
A program of the National Institutes of Health



National Institutes of Health
Office of Extramural Research

Foreign Award and Component Tracking System (FACTS) State Department User Guide

Latest Update:

July 27, 2023



CONTACT US

Document Comments:

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How are we doing? The electronic Research Administration (eRA) Communications & Documentation Team is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send feedback to eracommunications@mail.nih.gov.

Troubleshooting support:

Please contact the eRA Help Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

Web: <http://grants.nih.gov/support/> (Preferred method of contact)

Email: commons@od.nih.gov (for Commons Support)

Email: helpdesk@od.nih.gov (for IMPAC II Support)

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

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iv Latest Updates

Updates and new features in the Foreign Award and Component Tracking System (FACTS):

April 27, 2023

New Look and Feel

All screens in FACTS have moved to the new visual appearance adopted by other eRA modules. The capabilities remain the same. The Checklist screens will adopt the new standard features being incorporated in eRA modules, such as:

-  Grid tool to specify how many table rows appear per page Grid tool — to prevent scrolling, use this tool to specify how many table rows appear per page.
-  Download tool icon to export table data to Excel or PDF, or to print or export feature — Use the download tool to export table data to Excel or PDF, or to print.
-  Apps menu icon to navigate to other modules Apps menu icon to navigate to other modules.
- Updated header and footer.
- Action menus and buttons are aligned to the right on all screens.

September 6, 2022

State Department users can now login to FACTS with two-factor authentication using Login.gov. See [State Department Access](#).

NOTE: If you have not already associated the eRA account used to access FACTS with Login.gov, take this action first: [Associating Your FACTS Account With Login.gov](#)

1 Process Flow

Users with the State Department Clearance (SDC) manager account can perform the following functions in FACTS:

- Search for State Department Clearance Requests (SDCR)
- Manage State Department Clearance Requests (SDCR)
 - Approve or return to Agency
- View State Department Clearance Request (SDCR)

2 State Department Access

State Department users can access the external FACTS system directly:

1. Navigate your internet browser to <https://public.era.nih.gov/facts/sd>.
2. The FACTS Login screen opens:

U.S. Department of Health & Human Services NIH National Institutes of Health

NIH Foreign Award and Component Tracking System (FACTS)

The U.S. Department of State plays an important role in the NIH international grants awarding process by reviewing grants and awards with foreign components (i.e. foreign institution, foreign researcher, or research conducted outside of the U.S.) to ensure consistency with U.S. foreign policy objectives. Data is submitted to the State Department from NIH's Fogarty International Center through the Foreign Award and Component Tracking System (FACTS).

Please enter your Username and Password
Note: Your session will timeout after 45 minutes of inactivity.

Login with Login.gov ?

LOGIN.GOV

Login with eRA Credentials ?

Username:

Password:

Login Clear

[Forgot Password/Unlock Account?](#)

(For External Users Only)

If you don't have an account, please contact your FACTS administrator.

News on FACTS

1/28/2013The FACTS system is live!

WARNING NOTICE
You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

1. You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
2. Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

2.1 Login with Login.gov

NOTE: If you have not already associated the eRA account used to access FACTS with Login.gov, take this action first: Associating Your FACTS Account With Login.gov

1. After you have associated a Login.gov account your eRA account, navigate to the FACTS login screen as shown above.
2. click on the Login.gov logo: .
3. A confirmation message displays. Click **Continue** to proceed:

Confirmation Required

Access to NIH/eRA systems is available via Login.gov

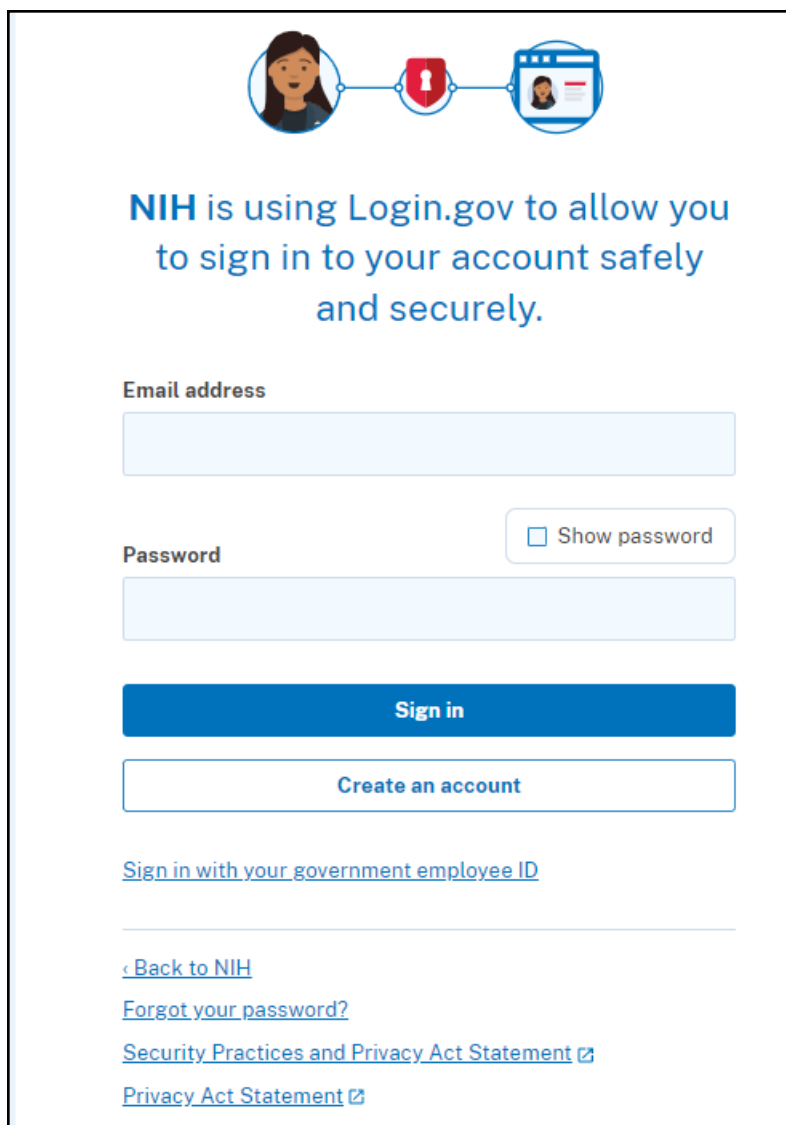
- If you run into issues with login.gov or associating your login.gov account with your eRA account, please contact the eRA Service Desk at <https://grants.nih.gov/support/index.html>.
- You can also refer to login.gov for additional help at <https://www.login.gov/help/>

For additional information:
** Two-Factor Authentication: Accessing eRA Modules via login.gov

Please select Continue to be redirected to Login.gov or Cancel to return to the NIH/eRA application login page.

ContinueCancel

4. The Login.gov login page opens:



NIH is using Login.gov to allow you to sign in to your account safely and securely.

Email address

Password ☐ Show password

Sign in

Create an account

[Sign in with your government employee ID](#)

[Back to NIH](#)

[Forgot your password?](#)

[Security Practices and Privacy Act Statement](#)

[Privacy Act Statement](#)


5. Enter your Login.gov credentials (email address and password) and click **Sign in**.
6. Complete the two-factor authentication method you have set up for your Login.gov account.

Upon successful login, the [SDC Search and Hitlist screen](#) opens.

NOTE: If you run into issues with Login.gov or associating your Login.gov account with your eRA account, please contact the [eRA Service Desk](#).
[You can also refer to Login.gov for additional help at https://www.Login.gov/help/](https://www.Login.gov/help/)

2.2 Login with eRA Credentials

1. Navigate to the FACTS screen as shown above.
2. Enter your eRA credentials (Username and Password).

3. Click the  **Login** button.

Upon successful login, the [SDC Search and Hitlist screen](#) opens.

NOTE: This method is being phased out gradually and eventually the use of Login.gov will be required to access FACTS. We recommend you take the time to change to Login.gov soon, well before it is required. To get started, see the instruction here: [Associating Your FACTS Account With Login.gov](#).

3 Search for State Department Clearance Request (SDCR)

3.1 SDC Search and Hitlist screen

When State Department users log into FACTS, the *SDC Search and Hitlist* screen opens, as shown below.

The system automatically performs a search for all State Department Clearance Request (SDCR) records with status of *Pending State Dept Review* for the countries assigned to you. The SDCR records are sorted by the date the SDCR was submitted to the State Department, and then by *Investigator Name*.

FACTS | SDC Search and Hitlist

SDC Search and Hitlist ?

Search Criteria for Foreign Clearances

Keyword

Type of Keyword
☒ Appears in research objective
☐ Appears in project title
☐ Appears in both
☐ Appears in either

FY(s)

Clearance Status

Country

State/Province

City

Clearance Type
☒ All
☐ New
☐ Renewal

Foreign Component Type
☒ All
☐ Direct foreign award
☐ Domestic award with foreign involvement
☐ Foreign award with foreign involvement

Contract Identifier

Project Number ?

Investigator's Last Name

Investigator's First Name

Institution/Organization

Involves Humans
☒ All
☐ Yes
☐ No

Involves Animals
☒ All
☐ Yes
☐ No

Project Status
☒ All
☐ Funded only

☐ Calculate and display total estimated US dollars by country

Clear

Search Criteria: FY(s): 2023 Clearance Status: Approved Country: All Assigned Clearance Type: All Foreign Component Type: All Involves Humans: All Involves Animals: All Project Status: All

Filter table 25 Results of 176 1 of 8

	Clearance ID	Project Number/Contract Identifier	FY	Country	Investigator Name	Clearance Status	Submitted to State Date	State Approval Date	Estimated Clearance Amount (in US \$)
<input type="checkbox"/>	231736 View	R01AI148-03	2023	Bangladesh	Potter, Harry	Approved	01/07/2022	01/21/2022	\$1,229,460.00
<input type="checkbox"/>	232266 View	U01AI168-01	2023	India	Granger, Hermione	Approved	01/26/2022	10/04/2022	\$2,593,713.00
<input type="checkbox"/>	232748 View	R37AI102-11	2023	Brazil	Weasley, Ron	Approved	02/07/2023	02/12/2023	\$6,000.00

3.2 Search for SDCRs

Users with the State Department Clearance (SDC) manager role can use this screen to search for SDCRs in their assigned countries.

For user searches, the search result is a hit list that displays SDCR records for the following statuses:

- Pending State Department Review
- Pending Agency Review (Returned by State for Clarification)
- Approved

1. To execute a search, click to open the *Search Criteria for Foreign Clearances* section:

FACTS | SDC Search and Hitlist

SDC Search and Hitlist ?

Search Criteria for Foreign Clearances

Keyword

Type of Keyword
☒ Appears in research objective ☐ Appears in project title ☐ Appears in both ☐ Appears in either

FY(s)

Clearance Status

Country

State/Province

City

Clearance Type
☒ All ☐ New ☐ Renewal

Foreign Component Type
☒ All ☐ Direct foreign award ☐ Domestic award with foreign involvement ☐ Foreign award with foreign involvement

Contract Identifier

Project Number ⓘ

Investigator's Last Name

Investigator's First Name

Institution/Organization

Involves Humans
☒ All ☐ Yes ☐ No

Involves Animals
☒ All ☐ Yes ☐ No

Project Status
☒ All ☐ Funded only

☐ Calculate and display total estimated US dollars by country

Clear

2.

3. Enter applicable search criteria. You can select the following criteria:

- Keyword — Enter keyword, and use the radio buttons to select the type of keyword.
- FY
- Clearance Status
- Country, State/Province, City
- Clearance Type (All, New, or Renewal)
- Foreign Component Type:
 - All
 - Direct Foreign Award

- Domestic Award w/ Foreign Involvement
 - Foreign Award w/ Foreign Involvement
- Project Number
 - Contract Identifier
 - Investigator's Name
 - Investigator's Institution/Organization
 - Involves Humans (All Yes No)
 - Involves Animals (All Yes No)
 - Project Status (All, Funded Only)
 - Calculate/Display Total Estimated US Dollars by Country (Click to display the sum of the Estimated Clearance Amount per country (in US \$).
3. Click the **Search** button. The *Foreign Clearances Hitlist* appears in the screen:

FACTS | SDC Search and Hitlist

SDC Search and Hitlist ?

> Search Criteria for Foreign Clearances

Search Criteria:

FY(s): 2023

Clearance Status: Approved

Country: All Assigned

Clearance Type: All

Foreign Component Type: All

Involves Humans: All

Involves Animals: All

Project Status: All

Filter table

25 Results of 176

1 of 8

	Clearance ID	Project Number/Contract Identifier	FY	Country	Investigator Name	Clearance Status	Submitted to State Date	State Approval Date	Estimated Clearance Amount (in US \$)
<input type="checkbox"/>	231736 View	R01AI148-03	2023	Bangladesh	Potter, Harry	Approved	01/07/2022	01/21/2022	\$1,229,460.00
<input type="checkbox"/>	232266 View	U01AI168-01	2023	India	Granger, Hermione	Approved	01/26/2022	10/04/2022	\$2,593,713.00
<input type="checkbox"/>	232748 View	R37AI102-11	2023	Brazil	Weasley, Ron	Approved	02/07/2023	02/12/2023	\$6,000.00

3.3 Process, View, Print, Export SDCRs

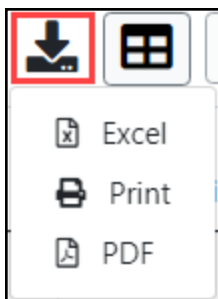
Depending on the SDCR status, the following actions display in the hit list's **Clearance ID** column:

SDCR Status	Action
Pending State Department Review	Process
Approved	View
Pending Agency Review - Returned by State for Clarification	View

SDCR Statuses and Actions

3.3.1 Actions

- **Process**— Clicking the **Process** link next to a Clearance ID opens the SDCR in the [Manage SDCR](#) screen: In that screen you can approve or return the SDCR and take other actions.
- **View** — Clicking the **View** link next to a Clearance ID opens a project's [State Department Clearance \(SDC\) Snapshot](#) in view-only mode.
- **Export or Print** — Use the checkboxes to select records, then click the download button to choose an export format: Excel, PDF, or Print (prints as PDF).



Note: In exported or printed PDFs, SDCRs are sorted by Country and Investigator Name, and each SDCR starts on a new page. The following information is displayed for each SDCR:

- Clearance ID
- Project Information
- Clearance Information
- Research Objective
- Sites

NOTE: Some countries are identified as having automatic approval capability. The system performs a process once a day and checks for SDCRs for those countries that have been in a *Pending State Department Review* status longer than the auto-approve time frame. Those SDCRs are automatically approved. They appear with the **View** hyperlink.

4.1 View State Department Clearance (SDC) Snapshot

The SDC Snapshot, shown below, opens when you select the **View** action in the [SDC Search and Hitlist](#) screen.

SDC SNAPSHOT ?

R01EY025-06

Project Title Adaptive allocation	PD/PI Name Shacklebolt, Kingsley	Institution UNIVERSITY OF ILVERMORNY UNIVERSITY OF ILVERMORNY 1600 Houston Drive MC 034 New York, NY 10002 UNITED STATES	Foreign Component Domestic with Foreign Component	Involved Countries Australia
---	--	---	---	--

Status and Action History
State Department Clearance Data
Notes

Status: Approved

Filter Table
4 Results of 4

<

1 of 1

>

Action Date ▾	Action Performed by ⚙	Action Description ⚙	Action Comments ⓘ ⚙
07/23/2015	Auto_approval	Approved	
07/09/2015	Moody, Alastor	Pending State Department Review	
07/08/2015	Lupin, Remus	Pending Agency Review	
07/08/2015	Lupin, Remus	Initiated	

Cancel

The upper part of the screen has information about the project, and the lower part is divided into these three tabs:

4.1.1 Status and Action History tab

Status and Action History
State Department Clearance Data
Notes

Status: Approved

Filter Table
4 Results of 4

<

1 of 1

>

Action Date ▾	Action Performed by ⚙	Action Description ⚙	Action Comments ⓘ ⚙
07/23/2015	Auto_approval	Approved	
07/09/2015	Moody, Alastor	Pending State Department Review	
07/08/2015	Lupin, Remus	Pending Agency Review	
07/08/2015	Lupin, Remus	Initiated	

Cancel

If a previous State Department Clearance Request (SDCR) or requests were submitted, the Status and Action History tab displays history information about that SDCR. If the SDCR was automatically approved, the Action Performed by column displays the words: Auto Approval.

4.1.2 State Department Clearance Data

Status and Action History

State Department Clearance Data

Notes

Clearance ID: 207091

Agency Contact

No Contact Assigned

Research Objectives

>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Expand All

Collapse All

Foreign Country: AUSTRALIA

Clearance type: New

Site(s)

Filter terms

1 Results of 1

Cancel

The State Department Clearance Data tab displays more detailed information about the SDCR that was submitted to the Agency or State Department. There is an email address hyperlink for the Agency contact that when clicked open an email message system screen addressed to the appropriate person.

4.1.3 Notes tab

Status and Action History

State Department Clearance Data

Notes

+ Add Note

Note Date	Note Entered by	Notes
02/07/2023 02:25 PM	Moody, Alastor	Test note with additional information
02/07/2023 02:25 PM	Moody, Alastor	Sample note

Cancel

When you click **Add Note**, the system opens a *New Note* window. Type your note and click Add Note to save it.

5 Manage State Department Clearance Request (SDCR)

5.1 SDC Form screen

The *SDC Form* screen opens when you select a **Process** action in the [SDC Search and Hitlist](#) screen.

FACTS | SDC Search and Hitlist

SDC FORM ?

U10CA180-01

Project Title	PD/PI Name	Institution	Foreign Component	Involved Countries
COG NCTN Network Group	BLACK, SIRIUS	ST. MUNGO'S HOSP FOR MAGICAL MALADIES RESEARCH INSTITUTE 36 CIVIC BLVD PHILADELPHIA, PA 19104 UNITED STATES	Domestic with Foreign Component	Argentina, Australia, Brazil, Canada, Chile, Egypt, India, Ireland, Israel, Japan, Mexico, Netherlands, New Zealand, Saudi Arabia, Switzerland

Status and Action History
State Department Clearance Data
Notes

Status: Pending State Department Review

Filter table 2 Results of 2

Action Date	Action Performed by	Action Description	Action Comments
08/02/2014	Potter, James	Pending State Department Review	
07/30/2014	Lupin, Remus	Pending Agency Review	

Cancel
Return to Agency for Clarification
Approve

Users with the State Department Clearance (SDC) manager account can use this screen to manage SDCRs in their assigned countries.

The upper part of the screen has information about the project, and the lower part is divided into these three tabs:

5.1.1 Status and Action History tab

Status and Action History State Department Clearance Data Notes

Status: Pending State Department Review

Filter table 2 Results of 2

Action Date	Action Performed by	Action Description	Action Comments
08/02/2014	Potter, James	Pending State Department Review	
07/30/2014	Lupin, Remus	Pending Agency Review	

Cancel
Return to Agency for Clarification
Approve

If a previous State Department Clearance Request (SDCR) or requests were submitted, the Status and Action History tab displays history information about that SDCR. If the SDCR was automatically approved, the Action Performed by column displays the words: Auto Approval.

5.1.2 State Department Clearance Data

Status and Action History

State Department Clearance Data

Notes

Clearance ID: 204173

Agency Contact

Moody, Alastor
moodyal@nih.gov

Research Objectives

The Children's Oncology, a National Cancer Institute supported clinical trials group, is the world's largest organization devoted exclusively to childhood and adolescent cancer research. The Children's Oncology unites more than 8,000 experts in childhood cancer at more than 200 leading children's hospitals, universities, and cancer centers across North America, Australia, New Zealand, and Europe in the fight against childhood cancer. research has turned children's cancer from a virtually incurable disease 50 years ago into one with an overall cure rate approaching 80 percent today.

The Children's Oncology will design and conduct clinical trials that will continue to define evidence-based care standards, conduct laboratory investigations into cancer biology and variability in host response to treatment and translate these findings into new, more effective and less toxic treatment.

Expand All

Collapse All

Foreign Country: INDIA

Clearance type: New

Project Year	Fiscal Year	Estimated Total Cost at Country
1	2014	\$0
2	2015	\$0
3	2016	\$0
4	2017	\$0
5	2018	\$0
Total		\$0

Site(s)

Filter table

2 Results of 2

Site ID	Collaborator Name	Institution/Site	Address	Phone	Email	Involves Humans	FWA	Involves Animals	Animal Assurance
216528	Potter, James	Eye Institute	Hyderabad		eRATest@mai.l.nih.gov	Yes	Established	Not Specified	Not Specified
216529	Lupin, Remus	Research Foundation	Chennai		eRATest@mai.l.nih.gov	Yes	Established	No	Not Specified

Cancel

Return to Agency for Clarification

Approve

The State Department Clearance Data tab displays more detailed information about the SDCR that was submitted to the Agency or State Department. There is an email address hyperlink for the Agency contact that when clicked open an email message system screen addressed to the appropriate person.

5.1.3 Notes tab

Note Date	Note Entered by	Notes
03/03/2015 12:09 AM	Dumbledore, Albus	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Sed sed risus pretium quam vulputate dignissim suspendisse in est. Ornare lectus sit amet est. Sed risus ultricies tristique nulla aliquet enim. Consequat interdum varius sit amet mattis vulputate enim nulla. Nisl rhoncus mattis rhoncus urna neque viverra justo. In nisl nisi scelerisque eu ultrices. In cursus turpis massa tincidunt dui ut ornare lectus. Aliquam eleifend mi in nulla. Dolor magna eget est lorem ipsum dolor sit. Neque gravida in fermentum et sollicitudin ac orci phasellus. Faucibus et molestie ac feugiat sed lectus vestibulum mattis. Purus faucibus ornare suspendisse sed nisi lacus sed viverra. Nisl tincidunt eget nullam non nisi est sit. Rhoncus urna neque viverra justo nec. Faucibus vitae aliquet nec ullamcorper sit.

5.2 Actions

- Approve:** To approve the SDCR, click the *Approve* button. A comment window will open: Add a comment for the State and IC Staff and click *Approve*.
 When the Approve button is clicked, the system sets the SDCR status to *Approved* and sends an email to the Program Official (PO), the Grant Specialist (GS), and the initiator of the SDCR notifying them that the SDCR is approved. The *SDC Form* screen closes and the system returns to the [SDC Search and Hitlist](#) screen.
 - Return to Agency for Clarification:** To return the SDCR to the Agency, click the *Return to Agency for Clarification* button. A comment window will open: Add a comment for the State and IC Staff and click *Return to Agency for Clarification*.
 When the Return to Agency for Clarification button is clicked, the system closes the screen and returns to the *SDC Search and Hitlist* screen. The IC staff can now access the SDCR.
 - Add Note:** To add a note, click the *Add Note* button. The system opens a *New Note* window. Type your note and click Add Note to save it.
 - Add Collaborators:** To view additional collaborators, click the *Additional Collaborators (x)* in the appropriate site section. For more information, see the Add/Delete Additional Collaborators topic.
5. **Cancel:** Click the *Cancel* button to close the screen and return to the *SDC Search and Hitlist* screen.

The screen is divided into the following three sections:

- **Project Information**
- **Status and Action History**

- **State Department Clearance Data**

The **Project Information** section displays grant pertinent information.

If a previous State Department Clearance Request (SDCR) or requests were submitted, the **Status and Action History** section displays history information about that SDCR(s).

The following hyperlinks are available in the **Status and Action History** section:

- **Expand ALL** - when clicked expands the **Action Comments** column of each Action Comment
- **Collapse All** - when clicked collapses complete text of each **Action Comments** into one line
- **more** - when clicked expands the complete **Action Comments** column(s); only available for SDCR(s) submitted to the Agency
- **less** - when clicked collapses the **Action Comments** column(s); only available for SDCR(s) submitted to the Agency

The **State Department Clearance Data/Info** section displays more detailed information about the SDCR that was submitted. There are various email address hyperlinks that when clicked open an email message system screen addressed to the appropriate person.

The following hyperlinks and buttons appear in the **State Department Clearance Data** section:

- **View/Edit Notes**
- **Approve**
- **Return to Agency for Clarification**
- **Close**

Entering comments in the **Action Comments** text box is required for **Return to Agency for Clarification** action.

6 Create/View SDCR Notes

The ability to view and/or edit notes related to a SDCR is available via the **Add Note** hyperlink on the following screens:

- State Department Clearance (ICs and FIC/DIR)
- State Department Clearance Snapshot (ICs and FIC/DIR)
- SDC Form and SDC Snapshot (State Department)

This allows notes to be added to a SDCR without a specific action being taken.

NOTE: These notes are created and viewable by the appropriate Institute/Center (IC), the FIC/DIR, and the State Department.

The screenshot shows a web application interface with a top navigation bar containing four tabs: "Status and Action History", "State Department Clearance Data", "Related State Department Clearances", and "Notes". The "Notes" tab is currently selected. Below the tabs is a large text input area. In the top right corner of this area is a blue button with a plus icon and the text "+ Add Note". Below the input area is a table with three columns: "Note Date", "Note Entered by", and "Notes". The table is currently empty. In the bottom right corner of the interface is a blue "Cancel" button.

To view the SDCR's notes, click the Notes tab in the State Department Clearance Snapshot.

To create a note, follow these steps:

1. Click the **Add Note** button in the Notes tab.
2. The *New Note* screen opens:

The screenshot shows a modal dialog box titled "Add a Note" with a close button (X) in the top right corner. Below the title bar, the word "Notes" is displayed. A message states, "Saving SDCR notes does NOT send the SDCR." Below this message is a large text input area with the placeholder text "Enter notes". At the bottom left of the text area, it says "4000 characters remaining". At the bottom right of the dialog, there are two buttons: a "Cancel" button and a blue "Add Note" button with a save icon.

3. Enter notes in the text box and click **Add Note**.

Clicking the **Add Note** button saves the note along with the date and the user who submitted the notes, and sends an email notification to the appropriate IC and to the FIC/DIR.

NOTE: Clicking the **Add Note** button does **not** submit the SDCR to FIC/DIR. Clicking the **Send to Agency** button on the *State Department Clearance* screen submits the SDCR to FIC/DIR.
